

STATE OF CALIFORNIA
CALIFORNIA DEPARTMENT OF AGING
DUTY STATEMENT
CDA 9003 (REV 04/2021)



See CDA 9003-I for Instructions	
1. INCUMBENT Vacant	2. EFFECTIVE DATE (MM/DD/YYYY) TBD
3. DIVISION Division of Administrative Services	4. UNIT NAME Financial Management Branch - Budget Operations Bureau
5. CLASSIFICATION Research Data Specialist II	6. POSITION NUMBER 797-651-5758-001

7. SUPERVISOR'S STATEMENT: *I CERTIFY THAT THIS DUTY STATEMENT REPRESENTS AN ACCURATE DESCRIPTION OF THE ESSENTIAL FUNCTIONS OF THIS POSITION.*

SUPERVISOR'S NAME (Print) Kim Elliott	SUPERVISOR'S SIGNATURE	DATE
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8. EMPLOYEE'S STATEMENT: *I HAVE READ THIS DUTY STATEMENT AND AGREE THAT IT ACCURATELY REPRESENTS THE DUTIES I AM ASSIGNED.*

EMPLOYEE'S NAME (Print)	EMPLOYEE'S SIGNATURE	DATE
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You are a valued member of the department's team. You are expected to work cooperatively with internal and external stakeholders to enable the department to provide the highest level of service possible. Your efforts to treat others fairly, honestly, and with respect are important to everyone who works with you.

<p>9. DESCRIPTION</p> <p>Under the general direction of the Chief Budget Officer (Staff Services Manager II)), within the Financial Management Branch (FMB), Budget Operations Bureau (BOB), the Research Data Specialist II (RDS II) performs a variety of complex budgetary functions for the California Department of Aging (CDA) and the California Commission on Aging (CCoA) within the Financial Management Branch (FMB), Budget Operations Bureau (BOB). The RDS II is responsible for state operation and local assistance budget development and research, Title III Area Plan administration and maintenance, budget change proposal development and legislative analysis, and other complex budgetary projects and activities. The tasks require the ability to troubleshoot complex problems, review and validate statistical data and information, Excellent communication skills, and independence of action in carrying out the responsibilities. These duties are broadly defined as follows:</p> <p>40% State Operation and Local Assistance Budget Research and Development</p> <ul style="list-style-type: none"> Develops, researches fiscal data, and justifies the state operations administration budget Title III, Title VII, and CCoA programs identifying areas of concern, deficit, or surplus. Independently maintains, reviews, and troubleshoots monthly projections which includes the maintenance and review of methodologies and statistics for any distributed administration and Title III costs. Responsible for informing the Chief Budget Officer of potential funding concerns and suggesting solutions. Collaborates with and advises the Chief Budget Officer on all issues relating to the department's budget operations. Coordinates the preparation of all CDA and CCoA State

Operations budget schedules, Financial Information System for California (FI\$Cal) data uploads, budget summaries, and reports as directed by the Department of Finance (DOF). Prepares fiscal summaries as needed by Executive Management, Chief Financial Officer (CFO), Chief Budget Officer, DOF, and the Legislature. Identifies potential State administration funding concerns and offers comprehensive solutions for consideration by the Chief Budget Officer.

- Serves as CDA's subject matter expert (SME) relating to Title III, Title VII, and CCoA appropriations and program funding requirements. Compiles data and statistical information using Microsoft Excel and departmental databases related to the funding allocations for review and use by stakeholders and department staff. Develops allocation tables and models that comply with department policies and objectives. Submits Budget Revisions, as necessary, for consideration by DOF. Proactively collaborates with program staff to ensure the total expenditure of all federal and state funds. Assists the Chief Budget Officer and accounting staff in validating federal financial reporting.
- Provides data and fiscal research and recommendations to the Chief Budget Officer, Chief Financial Officer, and Program staff in developing and implementing new financial policies, procedures, and processes pertaining to the Department's Strategic Goals and Master Plan for Aging. Proposes budgetary solutions and means to reach Departmental objectives as identified within the Strategic Goals.
- Updates and validates the Federal Funding Accountability and Transparency Act (FFATA) website for Title III and Title VII Notices of Award using the FFATA Sub-Award Reporting System.

30% Area Plan Administration, Validation, and Maintenance

- Calculates, develops, and validates CDA's Area Plan contracts which provide over \$100 million dollars in funding to local Area Agencies on Aging (AAAs) via federal Title III, Title VII, and General Fund monies. Regularly analyzes, reviews, and updates contract allocations for reallocation, carryover, and one-time only funding as well as amended Notice of Awards and updated U.S. Census data.
- Independently oversees the development and maintenance of the Intrastate Funding Formula (IFF) used to disburse funds to local AAAs. Partners with the Chief Budget Officer and CFO to analyze, research, and propose potential data and formulaic updates and revisions to the IFF. Serves as the SME on IFF related inquiries. Develops budgetary tools, tables, and charts to share IFF recommendations with internal and external stakeholders.
- Researches federal regulations and guidance related to the Older Americans Act, analyzes, and manages all mandated requirements of the Older Americans Act including the Maintenance of Effort and match. Identifies concerns and solutions regarding the Older Americans Act Maintenance of Effort and match. Provides data driven solutions to the Chief Budget Officer, Chief Financial Officer, and CDA's Executive Team. Implements, oversees, and sees to completion all proposed solutions.
- Completes all Local Assistance contracts, Contract Release Memos, Budget Displays, Standard 215 Data Worksheets, and Allocation Methodologies for Title III and Title VII programs.

20% Budget Change Proposal Development and Legislative Analysis

- Serves as the SME on Master Plan for Aging, department administrative funding, Title III, Title VII, and CCoA Budget Change Proposals, Spring Finance Letters, May Revisions Adjustments, and Legislative analyses. Coordinates closely with budget and program staff to research CDA

requests, calculate costs, provide well-articulated justifications, and provide responses to DOF and Legislative inquiries.

- Utilizes data analysis techniques to determine the fiscal impact of the most complex proposed and chaptered legislative legislation that pertain to CDA's state resource administration funding, Title III, Title VII, and CCoA. Provides guidance to senior and Executive management on technical and sensitive issues, policies, and legislation as they pertain to the CDAs budget.
- Reports all findings and research via Issue Papers, Administrative Memo, and email to the Chief Budget Officer before sharing information with external control agencies, such as DOF.

10% Miscellaneous Budgetary Projects and Activities

- Designs, develops, and maintains standard and ad-hoc financial management reports that assist senior and Executive management in setting CDA and CCoA priorities.
- Participates in meetings with departmental programs, Accounting Management Bureau (AMB), and BOB staff as the subject matter expert on administrative, Title III, Title VII, and CCoA budget policy.
- Serves as a representative of the Chief Budget Officer on sensitive financial matters.
- Serves as a back up to the SSM I Budget Specialist.
- Coordinates with AMB to ensure the design of CDA's financial system (FI\$Cal) reflects the budget structure.

Working Conditions:

- Due to the COVID-19 pandemic, CDA staff are working remotely per the state's emergency telework policy. The physical work location of the position is designated at the department's headquarters location, a two-story building and standard office modular workspace located in Natomas. The duties of the position require sitting for long periods of time while using a personal computer, reviewing documents, and attending meetings whether they are digital (i.e. Zoom, WebEx, MS Teams, etc.) or in person.

06/2021